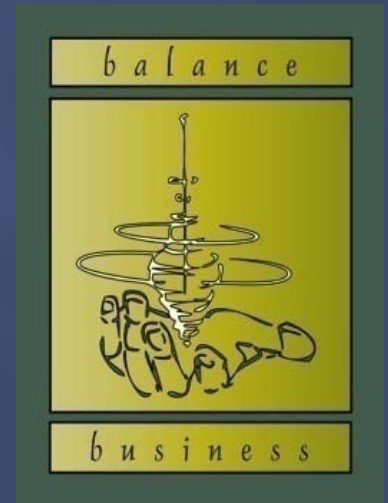




CHARTER START WORKSHOPS

Sustainable Organizational Strategies



Workshop Overview

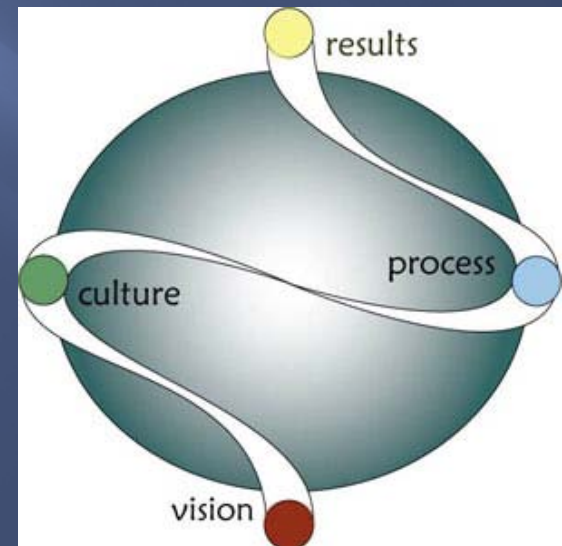
How do you build a sustainable
organization?

Workshop Overview

- ▣ What is organizational sustainability?
- ▣ Five Key Elements
 1. Strategic Planning
 2. Board Effectiveness
 3. Leadership & Administration
 4. Marketing & Communication
 5. Fundraising

What is organizational sustainability?

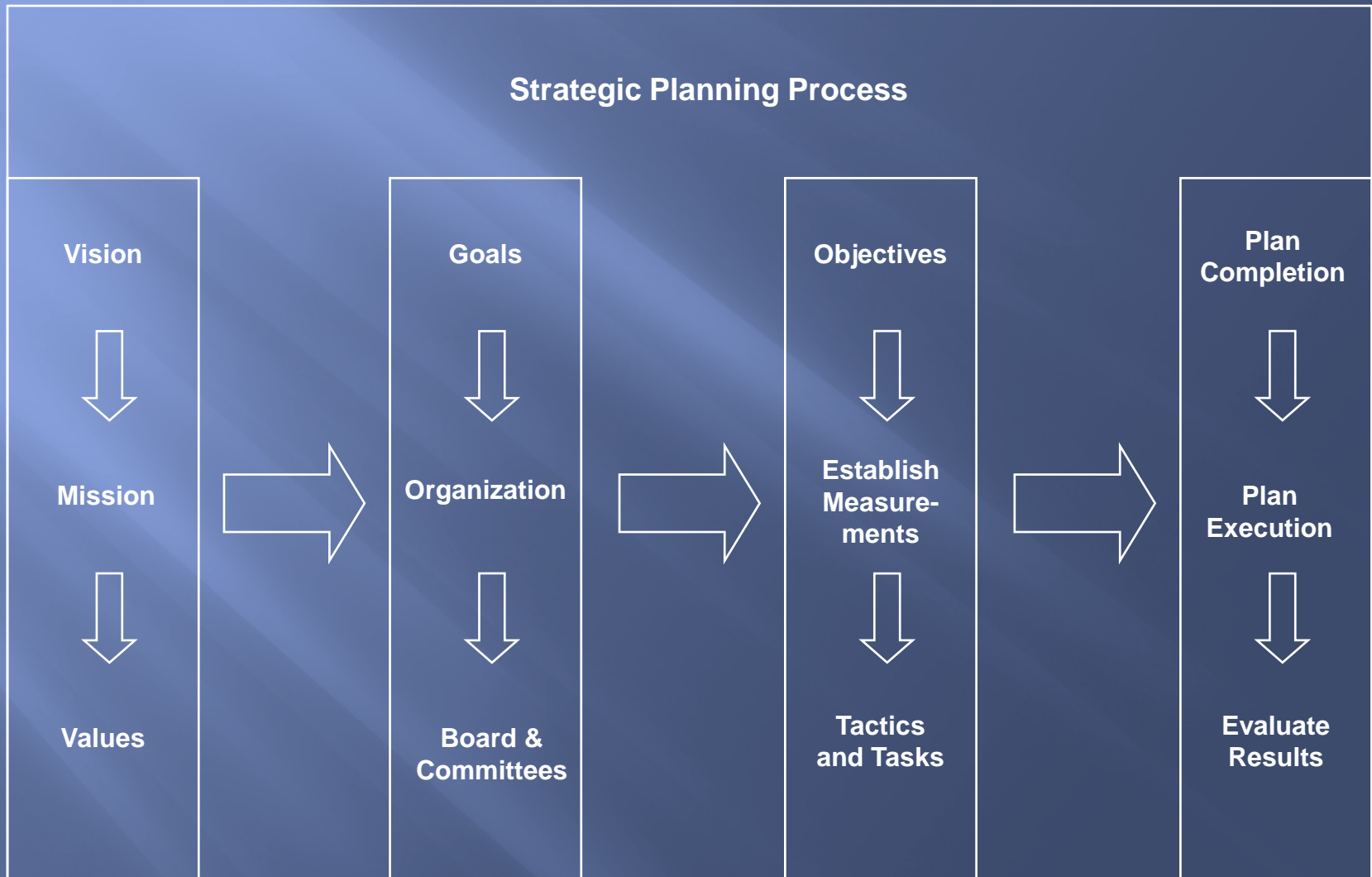
- ▣ Vision
 - Right strategy, leadership and message
- ▣ Culture
 - Right people, environment and alignment
- ▣ Process
 - Right policies, systems, marketing and services
- ▣ Results
 - Right measurements, reporting, budgeting and performance



Five Key Elements

1. Strategic Planning
2. Board Effectiveness
3. Leadership & Administration
4. Marketing & Communication
5. Fundraising

1. Strategic Planning



Strategic Planning

- ▣ Board and Administration Collaboration
- ▣ Vision, Mission, Values Development & Alignment
- ▣ Short and Long Term Goals
- ▣ Setting and Tracking Priorities
- ▣ Periodic Review
- ▣ Annual Updates

Vision, Mission, Values

- ▣ Vision
 - Something to be accomplished in the future
 - Stretch target & challenging
- ▣ Mission & Goals
 - Educational focus specific to your school
 - Present to future
- ▣ Values
 - Describes organization's culture
 - Defines preferred behavior with organization

Short and LongTerm Goals

- ▣ Short Term (1-2 years)
 - Address immediate first
- ▣ Long Term (3-5 years)
 - Brainstorm for big picture
 - Define characteristics of organization
- ▣ SMART Approach
 - S pecific
 - M easurable
 - A ttainable
 - R ealistic
 - T angible

Attitude is Everything, Paul J. Meyers

Priorities, Review, Updates

- ▣ All priorities tie back to strategic plan goals and vision, mission, values
- ▣ System to track progress against goals using monthly status reporting
- ▣ Review plan quarterly with board and staff in half day session; include professional development
- ▣ Update plan annually with board and staff in offsite retreat over 1-2 days

2. Board Effectiveness

- ▣ Governance
- ▣ Responsibility
- ▣ Board Development
- ▣ Effective Meetings
- ▣ Status Reporting

Board Governance

- ▣ What is governance?
 - Consistent management, cohesive policies, processes and decision-rights for a given area of responsibility
- ▣ 7 Principles
 1. Govern as stewards
 2. Establish organizational purpose
 3. Exercise fiduciary responsibility
 4. Delegate authority and ensure accountability
 5. Speak and act as one
 6. Spend the board's time only on things that matter
 7. Commit resources and time to developing good governance

Board Responsibility

- ▣ Board Responsibility
 - Conflict of Interest
 - Financial Oversight
 - Staff Management
 - By-Laws
 - Directors and Officers Liability Insurance
 - Vision and Strategy

Board Development & Meetings

- ▣ Board Members
- ▣ Board Decisions
- ▣ Board Development
 - Assessment tool
- ▣ Effective Meetings
 - Guidelines
 - Consent Agenda
 - Open Meetings
 - Status Reporting

Board Members

Board Matrix- Handout #1

Idaho State Department of Education

Charter School	Board and Committee Member Matrix							
Board Positions	Candidates	Organization	Title or Responsibility	Notes	Board Experience	Parent	Financial	Legal
Executive Committee								
President								
Vice President								
Secretary								
Treasurer								
Committee Chairs								
Development (fundraising strategy, sustainability)								
Marketing and Communications (website, newsletter, PR, brochure, etc.)								
Facilities Management								
Curriculum Development								
Etc.								
Committee Members								
Joanne Smith								
Etc.								
Notes:								

Add candidates by position, add as many lines as you need for each position

Mark qualifications desired for each position with an "X"

List all board positions

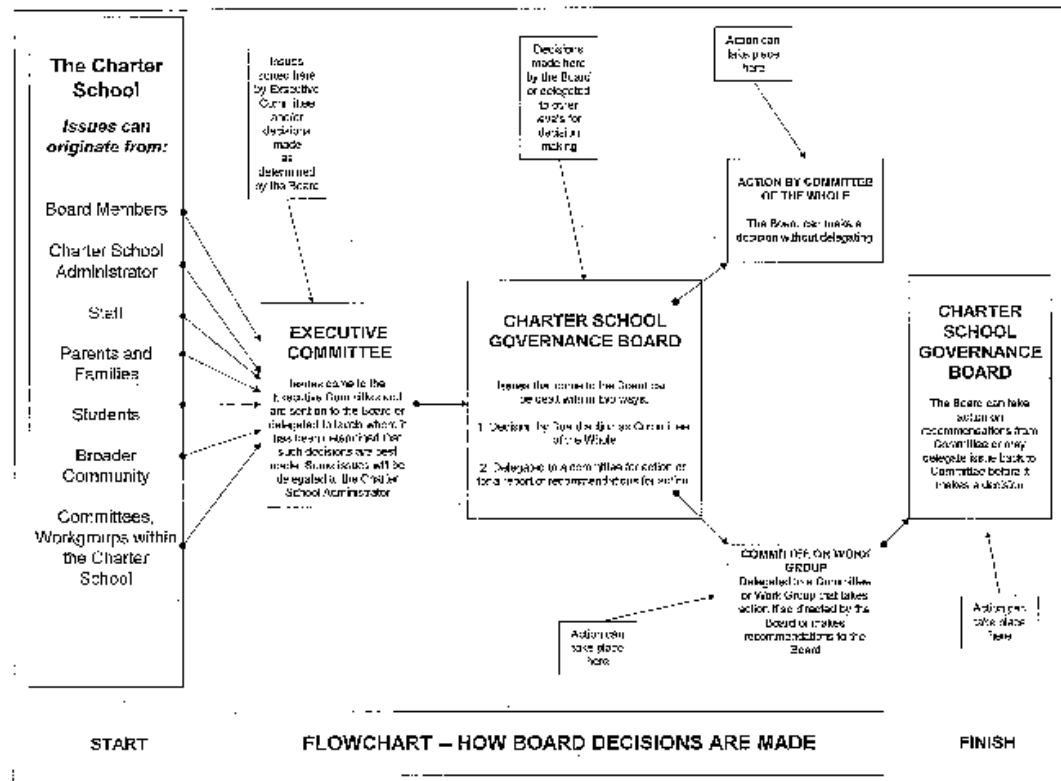
If candidate has a desired qualification, note in bold

If candidate has another qualification, note with "+"

Keep a candidate list separate, maybe below and plug them into positions

Board Decisions

Board Decisions-Handout #2



Board Development

Assessment Tool-Handout #3

Board Assessment Survey

Please evaluate each principle for board performance over the past year or since your involvement and rank each on a scale of 1-5 (1-ineffective, 2-somewhat effective, 3-effective, 4 very effective, 5-excellent, no improvement recommended)

Put the number for your evaluation next to the number in parentheses.

The Source:

Twelve Principles of Governance That Power Exceptional Boards

Exceptional boards add significant value to their organizations, making a discernible difference in their advance on mission. Good governance requires the board to balance its role as an oversight body with its role as a force supporting the organization. The difference between responsible and exceptional boards lies in thoughtfulness and intentionality, action and engagement, knowledge and communication. The following twelve principles offer chief executives a description of an empowered board that is a strategic asset to be leveraged. They provide board members with a vision of what is possible and a way to add lasting value to the organization they lead.

CONSTRUCTIVE PARTNERSHIP (1)

Exceptional boards govern in constructive partnership with the chief executive, recognizing that the effectiveness of the board and chief executive are interdependent. They build this partnership through trust, candor, respect, and honest communication.

MISSION DRIVEN (2)

Exceptional boards shape and uphold the mission, articulate a compelling vision, and ensure the congruence between decisions and core values. They treat questions of mission, vision, and core values not as exercises to be done once, but as statements of crucial importance to be drilled down and folded into deliberations.

STRATEGIC THINKING (3)

Exceptional boards allocate time to what matters most and continuously engage in strategic thinking to hone the organization's direction. They not only align agendas and goals with strategic priorities, but also use them for assessing the chief executive, driving meeting agendas, and shaping board recruitment.

CULTURE OF INQUIRY (4)

Exceptional boards institutionalize a culture of inquiry, mutual respect, and constructive debate that leads to sound and shared decision making. They seek more information, question assumptions, and challenge conclusions so that they may advocate for solutions based on analysis.

INDEPENDENT-MINDEDNESS (5)

Exceptional boards are independent-minded. They apply rigorous conflict-of-interest procedures, and their board members put the interests of the organization above all else when making decisions. They do not allow their votes to be unduly influenced by loyalty to the chief executive or by seniority, position, or reputation of fellow board members, staff, or donors.

ETHOS OF TRANSPARENCY (6)

Exceptional boards promote an ethos of transparency by ensuring that donors, stakeholders, and interested members of the public have access to appropriate and accurate information

Effective Meetings: Guidelines

Board Guidelines-Handout #4

1. Regularly scheduled meetings
 - a. Board Meetings
 - i. When?
 - ii. Where?
 - b. Executive Committee to meet monthly, date and time TBD
2. Communication process
 - a. Email is preferred
 - b. Phone call if requested by board member or due to shortened timeline
3. Meeting Preparation
 - a. Committee reports are sent to secretary one week in advance of meeting by committee chairs and treasurer.
 - b. Agenda, committee reports and additional materials for meetings are sent by secretary to board members five days in advance of meeting.
 - c. Board members are expected to read all meeting materials in advance of the board meeting and come to the meeting prepared for discussion and decisions.
4. Agenda
 - a. Consistent format
 - b. Consent
 - c. Items for business submitted from board members and committees
 - d. Distributed prior to board meeting
5. Roles and responsibilities
 - a. Board members (committee or board positions)
 - b. Additional roles and responsibilities to be determined
 - c. Executive committee (president, vice president, secretary, treasurer) established
 - d. Board development committee responsible for board member orientation
6. Succession plan
 - a. Board development committee to establish and communicate
7. Committee chairs and co-chairs
 - a. Marketing and communications
 - b. Fundraising
 - c. Board development
 - d. Finance
 - e. Legal
 - f. Public relations



Effective Meetings: Consent Agenda

Consent Agenda-Handout #5

A Board Resource Tool from the Midwest Center for Nonprofit Leadership

Consent Agenda

David O. Renz, Ph.D.

What is a Consent Agenda?

A consent agenda is a practice by which the mundane and non-controversial board action items are organized apart from the rest of the agenda and approved as a group. This includes all of the business items that require formal board approval and yet, because they are not controversial, there is no need for board discussion before taking a vote. Items may be on a consent agenda only if all board members agree; if even one member considers a specific item to need discussion, it must be removed and placed on the regular agenda for the board meeting.

Why are Consent Agendas Used?

Consent agendas are used to save board meeting time and to help ensure that board meetings focus on substantive topics that are worth discussion. Through the "bundling" process, the entire set of items of business that are not worth board meeting time can be voted on in one action versus taking the time to vote on each individual item.

When Should Consent Agendas Be Used?

Consent agendas should be used when there are a number of non-controversial business items on which the board needs to vote. Complete information must be provided in advance of the meeting to all board members, so that each knows what is being proposed and has the opportunity to consider whether the item truly is non-controversial. The key here is "non-controversial," and the definition of non-controversial may vary from organization to organization. Consent agenda items often are matters that a bylaw or some other rule or regulation requires to be formally approved by the board, yet there is no value added by engaging the board in discussion about the item (e.g., a routine lease renewal for a facility already included in the approved agency budget). Consent agendas are *not* to be used to hide actions that will be controversial — to do so breaches the trust of the board and undermines the value of this practice.

Where Should Consent Agendas be Placed within the Overall Meeting Agenda?

The consent agenda typically appears very near the beginning of the regular meeting. This allows any item removed from the consent agenda to be placed onto the overall agenda for discussion and action later in the meeting. As with all formal board action, a quorum must be present in order for action on the consent agenda items to be legitimate and binding.

Open Meetings

- ▣ Public agency...educational institution
- ▣ All meetings (decisions or deliberations) shall be open to the public
- ▣ No decisions made in secret
- ▣ 5 day meeting notice or regular monthly meetings with annual notice and 48 hour agenda notice
- ▣ 24 hour notice for special meetings, except in emergency
- ▣ Meeting minutes must be taken
- ▣ Executive sessions for specific purposes, special guidelines for closed sessions
- ▣ Board and committee meetings

Status Reporting

Board Status Report-Handout #6

Monthly Board Report Status

Date: Month/Year

Board Member:

Distribution: Board

Position:

1. Agenda Items (summary of anything for board discussion bulleted)

2. Tasks achieved since last report and tasks scheduled: (what the committee has done and will be doing)

3. Budget (current expenses and/or items requiring board approval)

4. Comments

3. Leadership & Administration

- ▣ Division of Roles
- ▣ Decision Making
- ▣ Administrator Recruiting
- ▣ Head of School Job Description
- ▣ Performance Management
- ▣ Board Reporting

Division of Roles

Division of Roles between Board and Administrator- Handout #7

Idaho State Board of Education

Division of Roles between Board and Administrator

Adapted from "Building and Managing an Effective Board of Directors", Center for Nonprofit Management in Southern California

This chart describes the roles and responsibilities of the board and the charter school administrator in critical areas. Review each entry and revise as based on the specific needs and requirements of your charter school. This chart should be reviewed on an annual basis and updated as necessary.

Responsibility	Board of Directors	Administrator
<i>Legal</i>	<ul style="list-style-type: none">Exercises fiduciary role to ensure that the charter school is properly managed. The board should have a mechanism to validate information from the administrator.Maintains legal status; insures the proper paperwork is submitted to governmental agencies.Reviews financial and business dealings and exercises proper judgment in self-dealing transactions – avoidance of conflicts of interest.	<ul style="list-style-type: none">Must provide information to the board to demonstrate that the charter school is well managed.Compiles information for annual filing requirements.Signals to the board if either of the above situations is likely to occur.
<i>Finance and Accounting</i>	<ul style="list-style-type: none">Approves annual budget.Reviews periodic financial reports (balance sheet, income statement, changes in financial position).Ensures that proper internal controls are in place.	<ul style="list-style-type: none">Prepares annual budget with input from staff and finance committee.Oversees preparation of periodic financial reports.Implements proper financial controls.

Decision Making

Board and Administrator Roles Worksheet- Handout #8

Governing Board and Administrator Roles Worksheet

How to Use this Worksheet

This tool is designed for use by a charter school that is already operating. It should be completed via a discussion by governing board members, the lead administrator, the business manager and/or other senior administrative staff, as appropriate for the charter school. The board should specify when subcommittees have a role.

The purpose of the instrument is to have a detailed discussion about roles and responsibilities and keep the documentation for future reference. The list of items is not exhaustive and may be adjusted to suit the unique needs of the charter school.

Note: in the chart, the word "blend" means the board and administration each have a role. In the case of blended roles, specific delineations should be noted in the "notes" column.

Task/Issue	Board	Administrator	Blend	Notes
<i>School</i>				
Maintains the vision/mission				
Implements the vision/mission on a daily basis				
Ensures compliance with the original charter				
Maintains legal status; ensures proper paperwork is filed				
Develops the strategic plan & implements it				
Monitors progress of the strategic plan				
Prepares board meeting agendas				
Prepares & distributes board packets				
Posts board meeting notices				
Maintains corporate records				
Identifies the need for new board policies				
Maintains contact with the authorizer				
Maintains relations with key community				

Administrator Recruiting

Selecting Administrator-Handout #9

Selecting, Reviewing and Supporting the Administrator

An effective board identifies and hires a capable administrator who shares the mission and vision of the school. The board is also responsible for the annual evaluation of the administrator and the setting of professional goals for improvement. Boards support administrators by ensuring that they have the necessary resources to accomplish goals and by conveying confidence in their day-to-day decisions.

Characteristics of a Quality Leader

- Focuses decisions on what is best for students
- Knows how to disaggregate data to make decisions about curricular adjustments and teacher training
- Communicates well with parents, students, faculty, board, and staff
- Recognizes a variety of needs by staff, faculty and students and is willing to find ways to meet their needs
- Incorporates input from stakeholders to provide shared ownership in decision making
- Knows how to effectively delegate tasks and responsibilities
- Leads by example by being highly motivated, accountable, and willing to actively pursue growth opportunities
- Communicates the vision to school staff, faculty, community members, authorizer, and students
- Stays current on educational research and is willing to try new things to meet the needs of students and staff
- Has demonstrated expertise in teaching and learning
- Knows how to inspire and create an effective professional learning community
- Is an excellent manager of people, time, resources, and budgets
- Has experience in and appreciation for the school model/philosophy

The Hiring Process

Given the independence of charter schools, the administrator must be both an instructional and a business leader. They must manage the facility and finances, oversee instructional and operational staff, engage with students, evaluate school culture and morale, represent the school to parents and the community, manage conflict, promote the school, ensure the school meets all local, state, and federal laws, encourage academic and professional excellence, and guide the school toward meeting its goals. In short, the administrator guides the school on the path to its mission and vision.

Creating a job description: The board should write a detailed job description for the position and decide how it will interview and select qualified candidates. The job description should include the minimum professional qualifications such as the type of degree, certification, and work experience; and the job duties.

Head of School Job Description

Job Description-Handout #10

Example: Head of School Job Description

The head of school is the sole employee of the board of trustees. In situations with very large schools and multiple divisions and/or campuses, often there is a president and one or more school heads. In those instances, the following job description is "divided" between president and school head(s), as mutually agreed upon by the president and the board of trustees.

Position Title: Head of School

Reports To: Charter School Board of Directors

Summary

The Head of School is responsible for overall operations of the school. S/he is a member ex officio of all standing committees of the Board, represents the Board to faculty/staff and students/families of the school, and sees that the general policies of the Board are understood and followed. S/he hires faculty and administration, holds regular meetings of the faculty and staff, and supervises and coordinates the activities of the entire organization.

Essential Duties and Responsibilities

The Head of School:

Board Relations

- Works with the board of trustees, its chair, and its committees in carrying out established school policies; reviews those policies and make recommendations for changes; attends meetings, prepares reports, maintains board records, and keeps trustees informed on all aspects of the school's operation.
- Provides to the board of trustees various scenarios and possibilities for the board to consider as it does its work focusing on the strategic future of the school.

Operations Management

- Supervises all programs of the school (academic, athletic, ethical, and other extracurricular programs); monitors curriculum, grading, testing, and reporting to parents; prepares for and conducts periodic program evaluations; submits reports to external agencies as required; establishes disciplinary policies and standards of conduct.
- Manages the sometimes competing demands of the various constituencies of the school.

Performance Management

Performance Plan Example- Handout #11

Idaho State Department of Education

Performance Management Plan Example

Employee Information		Performance Review Information	
Name:		Period Evaluated:	
Position:		Reviewed By:	
Employee Salary:		Review Date:	
Manager:		Next Review Date:	

Position Plan/Responsibilities of Job

Insert relevant job responsibility information here ...

Overall Rating	Outstanding	Exceeds Expectations	Successful	Needs Improvement	Unsatisfactory

Manager/Reviewer Comments

Insert comments from manager/reviewer here ...

Manager Signature: _____

Signature indicates manager set objectives and measures for the coming year and conducted the annual review.

Employee Comments

Insert comments from employee here ...

Employee Signature: _____

Signature indicates employee has received annual review and objectives and measures for the coming year.

Board Reporting

Status Report for Administration Example- Handout #12

Example of Status Report for Administration

REPORT NAME

Date of Report

Leader or Manager Authoring Report: <Name>

Distribution List for Report: <List of Names in Audience for Report>

Scope of Responsibilities:

A brief description of the scope of the committee, task force, or position.

1. Summary

A brief statement of performance covered since the last report. Summary should be bulleted and no more than 5 key points.

2. Milestones Achieved since Last Report

Goal/Objective/Task	Target Date	Completion Date
Description of goal, objective, or task		

3. Milestones Scheduled For the Next Reporting Period

Goal/Objective/Task	Target Date	Current Status
Description of goal, objective, or task		

4. Marketing & Communication

- ▣ What is marketing?
 - Everything you do to recruit and retain students
- ▣ Why communicate?
 - Tell your school's story
- ▣ Who needs to hear?
 - All stakeholders-parents, faculty, staff, board members, students, business leaders and community members
- ▣ How do you plan?
 - Marketing strategy

Marketing & Communication

- ▣ Marketing Plan
- ▣ Targeted Marketing
- ▣ Messaging
- ▣ Media
- ▣ Public Relations
- ▣ Community Engagement

Marketing Plan

Marketing Plan Outline- Handout #13

Marketing Plan Outline

- Current Positioning
- Desired Positioning
- Mission/Vision
- Current Situation
- Goals
- Objectives
- Target Audience(s)
- Organization Strengths
- Organization Weaknesses
- Competitive Environment
- Unique Value Proposition
- Strategies
- Messaging (for each target area)
- Tactics
- Budget/Timeline



Targeted Marketing

- Data analysis
 - Surveys
 - Research
- Describe the area or market/ district in which the school will operate
- Student population
 - What segment of the district's population do you plan to serve?
- Parent population
 - What is the demographic?

Messaging

- ▣ Develop succinct, consistent description of school's philosophy, educational programs, and benefits answering
 - Who are we?
 - What do we stand for?
 - Why does it matter?
 - Where are we headed?
- ▣ Develop appropriate communication materials
 - Website
 - Email
 - Brochures
 - Newsletters
 - Print advertising

Media

Creating an Effective Press Release- Handout #14

Creating an Effective Press Release

The best and most traditional way of getting your story out to the news media is through a press release (also known as a news release). A press release can be used for most types of news media, with subtle changes for radio and television.

News releases are not the time to get creative with language. They should be very straightforward. Focus on the facts: WHO, WHAT, WHEN, WHERE, WHY and of course HOW. You want to reach the reporter and impress them with the event, story or "hook," the news angle that is going to get the reporter interested in attending an event or writing about charter schools.

It is best to write a news release as factually and as concisely as possible. Keep in mind that reporters and editors come across dozens, if not hundreds, of press releases a day.

Here are a few key points to consider:

- Put the important factual information in the first paragraph.
- Put your release on your organization or school letterhead.
- Include a contact person and a daytime phone number at the top of the page.
- Include a quote from a charter school leader. If your news is an event featuring a visit from a distinguished guest (i.e. an elected official); be sure to include a quote from that person as well.
- Spell out all numbers from one to nine. Use numbers for 10 and up.
- Page number your news releases if they go beyond one page. It is important to remember that most news releases should be a single page in length.
- Always put the date at the top of your press release.
- Send your press release to the media early in the morning on the day of the release. It is best if the reporter receives the release just before arriving to work.
- Follow up the release with a phone call to the reporter you are targeting.
- Signal the end of your news release at the bottom with this symbol: ###
- MOST IMPORTANT! Have more than one person proofread your document. Check it thoroughly for typos or mistakes.



Public Relations

- ▣ Develop partnerships and provide value to parents, staff, faculty, board members and the public
- ▣ Public relations functions:
 - Promotes community input
 - Anticipates image problems and provides solutions
 - Handles publications including newsletter and website
 - Acts as key contact for media: writes press releases; works to get media coverage of school news
 - Designs objective, informational material for budget/bond issue campaigns
 - Designs all levels of communications, including writing a crisis communication plan
 - Conducts public relations research, surveys, and polls; interprets results
 - Creates avenues for student/staff recognition
 - Trains employees in the importance of public relations

Community Engagement

- ▣ To whom are we most accountable? Our stakeholders include:
 - Students
 - Parents
 - Board members
 - Broader community
- ▣ Engagement is a two-way street ...the school listens to parents and the community, communicates and reports to them about their charter school, and invites involvement in the school by its stakeholders

Community Engagement

- Listening to stakeholders may include:
 - Surveying parents to solicit input prior to making a major policy decision
 - Convening a series of parent/community forums chaired by board members to discuss a major challenge facing the charter school
 - Hosting monthly parent coffees to create informal opportunities to meet and hear concerns
 - Designing strategic planning process with ample opportunities for parent and community participation

5. Community Engagement

Charter School Partnerships- Handout #15

Charter School Partnerships

All charter school partnerships are not alike. The types of partnerships that exist between charter schools and other organizations can be distinguished based on three characteristics:

- What is the nature of resources exchanged in the partnership?
 - Financial resources
 - Human resources
 - Physical resources
 - Organizational resources
- What is the form of the partnership?
 - Formal
 - Informal
- What is the depth of involvement in the partnership?
 - One level
 - Multi level

The types of organizations charter schools elect to partner with vary widely but commonly include the following:

Sector	Types of Organizations
Non profit	<ul style="list-style-type: none">• Community-based organizations (recreational centers, neighborhood outreach agencies)• Cultural institutions (museums, local performance groups)• Educational institutions (private colleges, universities)• Faith-based organizations (churches)• Nonprofit educational management organizations• Race/ethnic-based organizations• Social service providers (child and family welfare agencies)• Private foundations
For profit	<ul style="list-style-type: none">• Education management organizations• Local businesses
Public	<ul style="list-style-type: none">• Cultural institutions (art museums, science museums)• Educational institutions (school districts, community colleges, universities)• Public health providers (hospitals)• Government/Municipalities (city offices, mayor's office)• Police departments

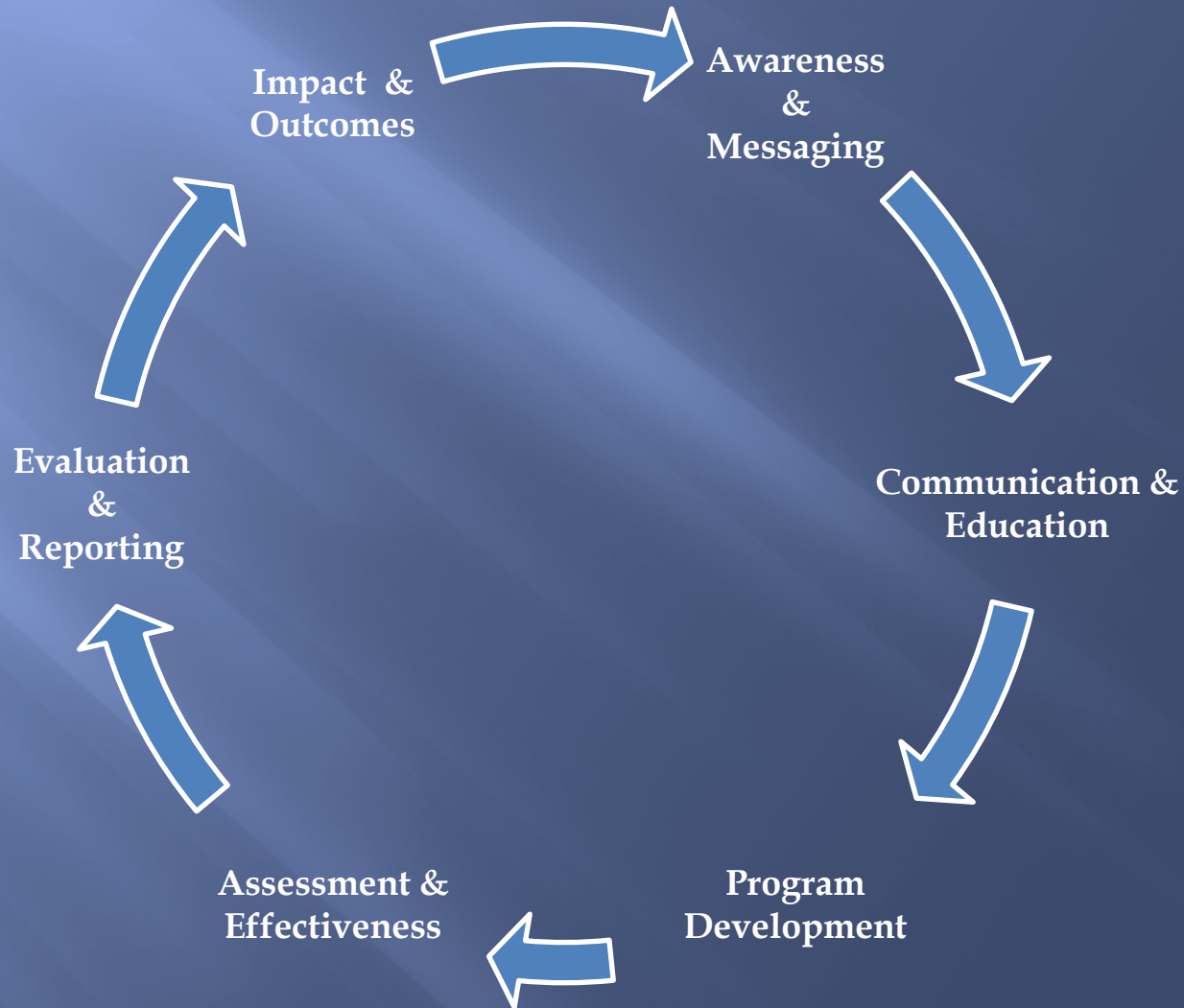
Lesson 1: Weigh the Costs of Partnering

An established partner can offer a range of resources—additional finances, a unique curriculum, access to facilities—needed for a school's survival. Some charter school leaders acknowledged that, were it not for the funds provided by a partner, the school simply would not exist.

5. Fundraising

- ▣ Development
 - Whose job is fundraising?
- ▣ Stakeholders
 - Who benefits directly and indirectly?
- ▣ Resources
 - What funding is available?
- ▣ Strategy
 - How do you develop a plan?

Stakeholders



Resources

- ▣ Foundations
- ▣ Private contributions
- ▣ Grants
- ▣ Partnerships
- ▣ In Kind
- ▣ Information
 - foundationcenter.org
 - idahononprofits.org

Strategy

Fundraising Plan for Charter Schools Example- Handout #16

Idaho State Department of Education

Example of Fundraising Plan for Charter Schools

A fundraising plan sets goals for the charter school's income, typically over a three to five year period. The plan should incorporate specific objectives and action steps that will help the charter school acquire and effectively use the financial resources it needs.

Summary

The goal of this overview is to lay out a strategy of fundraising that combined with tuition revenue will create financial sustainability for the Charter School. Fund development is an ongoing, rewarding process that engages all staff and every board member in some way. This document (and attachments) will become part of the Strategic Plan and should be reviewed and updated on a regular basis by the Development Committee of the Board of Directors.

Fund development provides a mix of funding that will sustain basic operations, allow for expansion of educational programs, and generate sufficient cash flow to cover operating costs. Activity associated with strengthening fund development should be taking place every day at the Charter School. It is vital to the sustainability of the school to place as high a priority on fund development as any other organizational component.

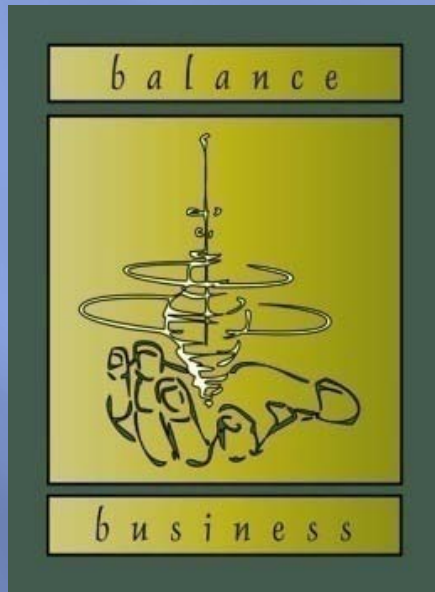
To some, fund development means having a bake sale or applying for a grant. It can and should be so much more. Fund development does include those activities, but *effective* fund development produces more than money. Fund development includes building stronger relationships, helping Board members feel comfortable asking for money, and understanding the interests of Charter School donors.

This overview will outline fundraising areas and will show projections of what needs to be raised in each area. Each area has a committee associated with it that will determine the goals and timeline for each fundraising activity. The Development Committee of the Board oversees all of the fundraising activities. The importance of preparing monthly progress reports cannot be stressed enough. These reports, prepared by the Development Director, are essential to monitoring the plan by comparing the actual results of fundraising activities with the projected incomes of each area. This information allows us to focus on activities that are productive and intervene in areas that are not.

Each year the Head of School, Development Director and the Board Development Committee work together on the development plan for the year to come and provide to the Board a written evaluation of the past year's development efforts.

Workshop Summary

- ▣ How do you build a sustainable organization?
- ▣ What is organizational sustainability?
- ▣ Five Key Elements
 1. Strategic Planning
 2. Board Effectiveness
 3. Leadership & Administration
 4. Marketing & Communication
 5. Fundraising



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